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UNIVERSITY OF ALBERTA

COUNTRY-OF-ORIGIN EFFECT IN CONSUMERS' APPAREL CHOICES

BY

JANE QIN LANG

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH

IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE

OF MASTER OF SCIENCE

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THE UNDERSIGNED CERTIFY THAT THEY HAVE READ, AND RECOMMEND TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH FOR ACCEPTANCE, A THESIS ENTITLED COUNTRY-OF-ORIGIN EFFECT IN CONSUMERS' APPAREL CHOICES SUBMITTED BY JANE QIN LANG IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE DEGREE OF MASTER OF SCIENCE.

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ABSTRACT

Country-of-origin Effect in Consumers' Apparel Choices

by

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The purpose of this study was to determine Canadian consumers' beliefs about, and preferences for apparel products made in Canada, China and some other low-cost nations. The importance of country-of-origin of garments relative to other apparel attributes in consumers' purchase decisions was also examined.

The EKB model of consumer buying decisions, as revised by Engel, Blackwell and Miniard (1986) served as a broad conceptual framework for the present study, while the information integration theory developed by Anderson (1981, 1982) provided the theoretical foundation for the conjoint analysis component.

A total of 106 female subjects, mainly from Edmonton, Alberta, participated in the study. A simulated purchase of fleece sweatshirts was designed to conduct the conjoint analysis experiment. Consumers' beliefs regarding various

attributes of apparel products made in Canada, China, Taiwan, Hong Kong and South Korea were measured using a 7-point scale. Consumers' awareness of country-of-origin, opinions about supporting domestic industries and demographic data were also recorded. Analyses of variance, Scheffe multiple comparisons and multiple regressions were used to test the null hypotheses.

Significant differences were found in consumers' beliefs about garments made in different countries regarding quality, price, style and fit. Canadian clothing was perceived to be the best in quality, style and fit, but the most expensive.

Results of the conjoint analysis indicated that Canada was the most preferred country of origin. The effect of country-of-origin on subjects' evaluations of sweatshirts, however, was not as important as that of quality and price.

Beliefs about quality, price, style and fit of garments made in Canada, China and South Korea were found to be significantly related to subjects' utilities for sweatshirts made in such countries, although the relationships were not strong. Some significant differences in beliefs and utilities were found among respondents who differed in awareness of country-of-origin, ethnic background, age and education, but not among those who held different opinions about supporting domestic industries.

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INTRODUCTION

Over the past three decades, the Canadian textile and apparel industries have been subjected to ever increasing competition from low-cost countries. Low-cost countries are developing and state-trading countries, as well as those more developed countries such as South Korea, which have the advantage of a low-wage labor system. Because of lower labor costs enjoyed by these foreign manufacturers, the Canadian textile and apparel industries are having a difficult time competing with imports on the basis of price. The market shares held by Canadian apparel manufacturers have experienced a general decline over time. Between 1981 and 1984, the total market share held by Canadian manufacturers dropped from 69 to 59 per cent (Textile & Clothing Inquiry, 1985). Such a declining trend in market share is mainly attributable to imports from low-cost countries. While the share of current market held by imports from all countries rose from 31 per cent in 1981 to 41 per cent in 1984, imports from low-cost countries increased their share from 27 per cent in 1981 to 37 per cent in 1984, but the share of other countries remained the same at 4 per cent of the apparel market (Textile & Clothing Inquiry, 1985).

The continuing penetration of foreign made textile and apparel products into the Canadian market threatens the domestic industries and thus employment. In response to this

economic and political situation, the Canadian government has adopted protectionist policies to control the rapid increase of imported apparel products. Through bilateral agreements between Canada and most low-cost clothing exporting countries, quotas have been set to limit the maximum quantity of various apparel items allowed to come into Canada for each country. In the meanwhile, programs such as the "Shop Canadian" and "Think Canadian" campaigns were initiated to promote domestic products. However, little research has been down on Canadian consumers' views toward imported clothing made in low-cost countries. Since consumers make the final purchasing decisions, it is critical for Canadian manufacturers and government policy makers to understand why Canadian consumers make the choices they do.

Among the low-cost countries, Hong Kong, South Korea and Taiwan are the three major textile and clothing exporting countries. Over the past ten years, the People's Republic of China has managed to significantly increase its textile and apparel exports to Canada, rising from an unranked position to the fourth in terms of volume of goods imported into Canada. The emergence of China's textile and clothing exports has increased the competition in the Canadian market. China's textile industry has a very long history and it plays an important part in its nation's economy. Exporting textile and apparel products is considered to be one of the major sources of earning foreign currencies. Because of the quota imposed

on imports, China is aiming to export better quality apparel products to increase revenue. However, ready-made clothing in China is still not well developed to meet the demand and taste of Canadian consumers. Therefore, it is also very important for China to know Canadian consumers' views about clothing made in China compared to those made in Canada and in other competitive exporting countries. Research is needed to help China's clothing manufacturers and exporting agencies design better marketing strategies.

Statement of the Problem

Consumers make choices among various alternatives of apparel products. In the Canadian market, clothing made in many different countries is available for consumers to choose. According to consumer behaviour theories, the purchase of a product is guided by the consumer's evaluation of the attributes defining the product. In the apparent competitive situation, both domestic manufacturers and foreign exporting countries such as the People's Republic of China will be interested in answers to questions like: (1) what product attributes are important to consumers; (2) does country-of-origin have an important effect on consumers' apparel buying decisions; (3) what are consumers' beliefs about and preferences for clothing made in Canada, China and the other low-cost countries?

The purpose of this study was to determine Canadian consumers' beliefs about and evaluations of apparel products made in Canada and some of the low-cost countries, and to determine the importance of the country-of-origin attribute relative to other product attributes such as quality and price in consumers' purchase decision making. It was hoped that relevant recommendations could be made, resulting from this study, to apparel industries of both Canada and China, to educators developing educational programs for consumers, and government agencies responsible for "country-of-origin" regulations.

Because of the diversity of apparel products in the Canadian market, only one product type was studied in order to keep the research to a manageable size and scope. Women's preferences for sportswear apparel made in various countries were investigated. Sportswear is a category of clothing in which both domestic and imported goods have certain market share but which is dominated by neither imported nor domestic products (Textile and Clothing Board, 1987).

Justification

Consumers are of major importance in determining the market success of apparel products made in various countries because it is the consumer who makes the final decision to purchase or not to purchase a certain apparel item. For this

reason, topics regarding consumers' attitudes toward apparel products of different countries-of-origin, and their buying behaviour, have been the focus of several researchers in recent years.

Only a limited number of studies have been conducted to determine Canadian consumers' attitudes toward, or preferences for, clothing made in different countries (Stickl, 1980; Wall & Heslop, 1985; 1986; Hester & Yuen, 1986). In their two studies, Wall and Heslop (1985, 1986) used mailed questionnaires to investigate consumers' overall views toward Canadian-made versus imported consumer goods in general. Stickl (1980) studied consumers' attitudes toward Canadian-made sportswear. Hester and Yuen (1986) conducted consumer intercept interviews in two U.S. locations and Edmonton, Alberta to test the assumption that consumer attitudes were accurately reflected in consumer behaviour and to assess the consistency of consumer attitudes with consumer behaviour following the purchase of an apparel item. Although these studies explored Canadian consumers' attitudes and behaviour toward products of various countries-of-origin, questions such as what are the determinants of consumers' purchasing decisions and how much country-of-origin influences a garment purchase have not been fully addressed.

Products are composed of many physical characteristics or attributes which are perceived differently by different consumers. When considering product purchases, consumers tend

to compare and contrast alternative products made up of different attribute combinations. Their preferences for apparel items may depend on the joint influence of product attributes such as price, quality, style, fiber content, and fit. Past research mostly used survey (questionnaire) methods to directly ask consumers' attitudes toward products of various countries. Joint effects of the country-of-origin attribute with other apparel attributes have not received much attention..

More recently, a few researchers have attempted to analyze the joint effect of two or more independent variables on the dependent variable, to study consumers' preferences for apparel items made in various countries (Boeckman, 1986; Dickerson, 1987). Boeckman (1986) used conjoint analysis to estimate the effects of several attributes; however, her results are potentially problematic because she used verbal descriptions to develop product profiles and only students as subjects. Dickerson (1987) used actual garments available on the market and was unable to control all factors, as is desired for conjoint analysis. These two studies obtained differing results, but served the purpose of exploring conjoint analysis as a method of studying country of origin effect in consumers' apparel choices. The present study was planned using realistic profiles for which the factors of interest vary, while others are controlled. Thus, the problems identified in the previous studies could be

alleviated. In addition, Boeckman (1986) and Dickerson (1987) used non-metric conjoint procedures. The present study, which uses metric conjoint procedures because of their superior statistical properties and predictive validity (Louviere, 1988), extends the exploration of the method.

Since the major increases in apparel imports are attributable to low-cost countries, especially the four major exporting countries and regions: Taiwan, Hong Kong, South Korea and the People's Republic of China, special attention should be given to examining the product images of these countries compared to Canadian-made. This study may provide useful information for the Canadian government and apparel manufacturers in formulating government policies, planning industrial promotion programs and designing marketing strategies. Results of the study can also be beneficial to apparel manufacturers and exporting corporations of China. By knowing Canadian consumers' beliefs and preferences for clothing made in China compared to those of other countries, China can design better marketing strategies and improve its competitive ability in the Canadian market.

Objectives

In keeping with the research problem, this study was designed to accomplish the following objectives:

1. To determine Canadian consumers' beliefs about apparel

items made in Canada, China, Taiwan, Hong Kong and South Korea regarding quality, price, style and fit.

2. To determine Canadian consumers' evaluations of sportswear items made in Canada versus China versus South Korea.

3. To determine the relative importance of quality, price and country-of-origin attributes in consumer's alternative evaluation for sportswear apparel made in various countries.

4. To determine the relationships between consumers' beliefs about sportswear from specific countries and their part-worth utilities for sportswear items from such countries.

5. To determine differences in beliefs and part-worth utilities among consumers who differ in the following variables:

a) consumers' awareness of country-of-origin;

b) consumers' opinion about buying domestic products;

c) the age, education and ethnic background of consumers.

Hypotheses

The following null hypotheses were formulated and have been tested to meet the objectives:

1. There are no significant differences among consumers' beliefs about apparel items made in different countries, regarding quality, price, style and fit.

2. There are no significant differences among consumers' part-worth utilities for sportswear items made in Canada, China and

South Korea.

3. There will be no significant difference in importance of quality, price and country-of-origin in consumers' purchase decisions for sportswear.

4. There are no significant relationships between consumers' beliefs about sportswear items from specific countries and their part-worth utilities for sportswear from such countries.

5. There are no significant differences in beliefs about garments made in different countries among respondents who differ on:

a) awareness of country-of-origin,

b) opinions about buying Canadian-made products,

c) ethnic backgrounds,

when controlling for age and education.

6. There are no significant differences in part-worth utilities for garments made in Canada, China and South Korea among respondents who differ on:

a) awareness of country-of-origin,

b) opinions about buying Canadian-made products,

c) ethnic backgrounds,

when controlling for age and education.

Definitions

Attributes: the determinant decision criteria consumers use to evaluate products or services (Louviere, 1988, p. 12).

Apparel attributes selected for inclusion in this study were price, quality, style, fit and country-of-origin.

Beliefs: perceptions of an alternative's performance on important evaluative criteria. For this study, consumers' beliefs about sportswear items from various countries regarding quality, price, style and fit were operationally defined as the scores obtained from 7-point perception scales (Appendix D).

Overall utilities: judgments, impressions, or evaluations that consumers form for products or services, taking all the determinant attribute information into account (Louviere, 1988, p. 12). This was operationally defined as the ratings given by respondents to sportswear items comprising different combinations and levels of product attributes in the conjoint analysis procedure (Appendix C).

Part-worth utilities: judgments that consumers make regarding "how good", "how satisfactory" particular positions of particular products might be on particular determinant attributes (Louviere, 1988, p. 12).

Preference: the relative favorability a person has toward an object. Consumers' preferences for sportswear items made in various countries were inferred from the utility values derived from evaluation ratings in the conjoint analysis procedure. That was, the product with the highest utility in any given choice set was assumed to be preferred.

Low-cost countries: those developing or state-trading

countries as well as those more developed countries which have the advantage of a low-wage labor system. Apparel items of Taiwan, Hong Kong, South Korea and the People's Republic of China were studied in this research.

Sportswear: a term associated with a variety of clothing; usually refers to casual clothing articles such as jogging suits, jackets, slacks and sweaters (Stickl, 1980). In this study, fleece sweat shirts were used to represent sportswear.

Country-of-origin: refers to the country where the major part of a garment is constructed (e.g., more than 50% value added).

II. REVIEW OF LITERATURE

This review of literature is divided into four sections. The first section presents a model of the consumer decision process to provide the broad conceptual framework for this study. The second section briefly describes the alternative evaluation stage of the decision process. The third section explores the conjoint analysis technique which is used as the research instrument for the present study. The last section is a summary of literature on consumers' views about imported apparel.

Conceptual Framework

How consumers evaluate products and make purchase decisions is the central focus of the present study. Decisions involve choices between two or more alternative behaviours or actions (Hansen, 1976), for instance, a choice between buying brand A and buying brand B. This study is particularly interested in the processes by which consumers make purchase choices among different alternatives. The EKB model of consumer buying decisions, as revised by Engel, Blackwell and Miniard (1986) serves as a broad conceptual framework for the present study.

According to the EKB model, consumer decision-making is viewed as a process of problem solving involving five stages:

problem recognition, information search, alternative evaluation, purchase and the outcomes of the purchase. The buying decision process starts with problem recognition: the consumer senses an unsatisfactory gap between his/her actual state and a desired state. He/she then recognizes a need and seeks to satisfy it. Motives and environmental stimuli are two sources of problem recognition. Once a problem is recognized, the consumer will search for relevant information about potential solutions to the problem from external environment, or by activating knowledge from memory. As a result of search, the consumer becomes acquainted with some product alternatives in the market and the features of those alternatives. These product alternatives are then compared and evaluated against important product attributes. Beliefs about how well each alternative performs on each important attribute are formed after comparing available alternatives. Consumers then combine information about different attributes to form an overall evaluation of each alternative. After comparing each product, a preferred product choice may be reached in this stage. Finally, a purchase action may be carried out. The purchase is influenced by buying intention and situational factors. After the consumer purchases a product, he/she will further evaluate the product on important product attributes with satisfaction or dissatisfaction as the outcome. This stage may influence consumers' beliefs and attitudes toward the product and therefore will affect future

behaviour.

A consumer may not be aware of the stages when making a purchase decision, nor will every stage always be present in each decision process. This is very much dependent on the individual, the situation and amount of personal involvement. Various elements of individual characteristics, social and situational factors will influence each stage of the decision process.

The focus of the present study, consumers' preferences for sportswear items, is the alternative evaluation stage. The process by which consumers integrate or combine attribute information to form overall evaluations of product alternatives is particularly relevant.

The Alternative Evaluation Stage

When studying the alternative evaluation stage of the decision process, consumer analysts often put emphasis on how the consumer evaluates choice alternatives in reaching a decision or what strategies and processing consumers use in forming an evaluation of the choice alternatives (Engel, Blackwell & Miniard, 1986). Generally, researchers have recognized two types of consumer choice strategies: compensatory strategies and noncompensatory strategies. A compensatory strategy refers to the situation in which a perceived weakness of one attribute may be offset by a

perceived strength of another attribute. For example, a high price of a garment may be compensated by the perceived high quality of the garment. On the other hand, when a weakness in one product attribute can not be compensated by other strong attributes, noncompensatory choice strategies may be engaged. Noncompensatory strategies usually involve simple procedures which require little time and effort. For instance, a consumer may set a cutoff level on a certain important attribute and eliminate those product alternatives which do not meet the requirement, say, "I won't buy any T-shirt that costs more than $20." Consumers may use a combination of compensatory and noncompensatory strategies to make a choice among a large number of alternatives.

Since compensatory rules involve evaluating each alternative individually based on the different levels of attribute combinations, they represent a more complex evaluation process. Researchers have developed multiattribute attitude models to depict compensatory choice strategies. Multiattribute attitude models represent a product as a group of attributes leading to costs and benefits of differential desirability to consumers (Wilkie & Pessemier, 1973). These models generally take two approaches. The first is a compositional or build-up approach, such as expectancy-value models, in which an attitude toward an object is based on a weighted sum of the object's perceived attribute levels and the likelihood of the object having the attribute (Wilkie &

Pessemier, 1973). In this approach, each important belief about a product is evaluated singly and then numbers representing the evaluation of each of the beliefs are added together to achieve a total utility for the multiattribute product. Since respondents are assumed to evaluate the value of one product attribute at a time, the possibility of interaction effects among attributes are usually overlooked in compositional models.

The second approach is a decompositional one, such as conjoint analysis, which starts with a subject's response to a set of "total" profiles of product choices and then finds a set of "part-worth" utility values for each individual attribute (Green & Srinivasan, 1978). Decompositional models allow respondents to give an overall evaluation for the multiattribute product based on all attribute information. Therefore, the joint effects of several product attributes on final product choice and the trade-offs made among the attributes can be analyzed. Metric conjoint analysis, which is used in this study, is based on information integration theory (IIT) developed by Anderson (1981, 1982). IIT is a theory about the response of numerical data (category-rating) to multiple pieces of information, for instance, combinations of different product attributes (Louviere, 1988). The information integration process can be conceptualized as follows:

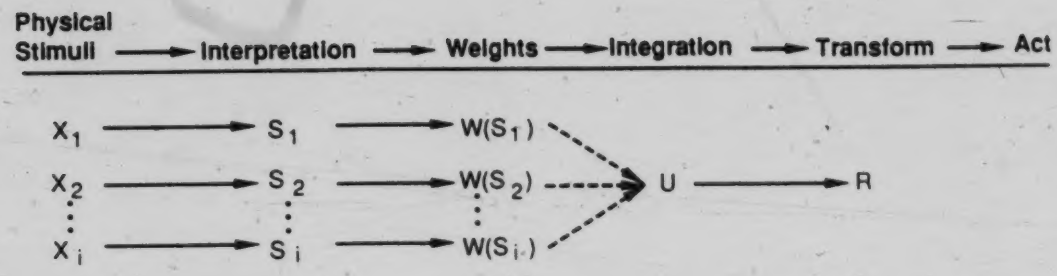

Figure 1. Information Integration Process (adapted from Anderson, 1982, p.5).

When exposed to information (physical stimuli X_i) in the environment, consumers interpret their meaning in terms of their own interests, values, and past experiences. For example, when seeing a price tag labelled "$19.99" for a jogging suit, one person may interpret it as " inexpensive" while another person may think the price indicates "expensive". The knowledge and beliefs that are activated from memory will influence how the new information is comprehended (Peter & Olson, 1987). The interpretation process maps physical stimuli (e.g., brand name, style, price) into subjective perceptions (S_i). Consumers also place different weights on perceived stimuli. Weights represent the relative importance or determinance of each stimulus in the overall response (Anderson, 1981). How people weigh each stimulus, such as a product attribute, depends on their personal values. A wealthy person may put more weight on brand status than on price, while a person with a tight budget

may place high importance on price. Then, consumers combine (integrate) all the weighted perceptual information $W(S_i)$ and form an overall impression of the product (U). A value judgement is made about the overall positioning of the product. Finally, implicit judgments are transformed into an explicit response (R). A choice decision may be made in this stage.

The integration or combining of attribute information to make overall evaluations of products may be studied using conjoint analysis techniques. Conjoint analysis starts with the consumer's overall evaluation (e.g., preference ranking or rating) of a product alternative, then decomposes the evaluation data into part-worths to discover the utility of each attribute and levels of the attribute (Green and Tull, 1978). The next section briefly reviews the literature describing the conjoint analysis technique.

The Conjoint Analysis Method

According to Green and Srinivasan (1978), conjoint analysis refers broadly to any decompositional model that estimates the structure of a consumer's preferences, given his/her overall evaluations of a set of alternatives that are prespecified in terms of levels of different attributes. This definition expresses the commonalities of various conjoint analysis techniques. In the literature, a variety of conjoint

analyses with different paradigms, methods and analytical techniques have been used. Conjoint paradigms vary in their assumptions, methods of analysis and research procedures (Louviere, 1988). Generally, two types of conjoint analysis methods have been used in the literature. One is the rank-order conjoint method in which respondents rank-order different product alternatives described by combinations of levels of different determinant attributes (Green and Srinivasan, 1978). The other is the category-rating conjoint method which is the approach used in the present study. The theory underlying the category-rating conjoint method is information integration theory as described in the previous section. According to the information integration theory, the basic assumptions for the category-rating conjoint analysis are (Louviere, 1988, pp.15-16):

(1) A consumer's response strategy toward various product alternatives reveals his or her decision strategy. The response strategy can be approximated by algebraic conjoint models amenable to experimental investigation and statistical parameterization. It is also assumed that consumers use decision rules (e.g., compensatory strategies) when making a judgment response or rating.

(2) A consumer's responses to combinations of levels of attributes on category-rating scales are approximately interval in measurement level.

(3) The unknown and unobservable overall utility that a

consumer has in his or her mind regarding a product is linearly related to a consumer's response on a category-rating scale. That is,

$$U_j = a + bR_j + e_j \qquad (1.1)$$

where U_j is the overall utility of the jth product alternative, R_j is the observed response on a category-rating scale, and e_j is a normally distributed error term with a mean of zero and constant variance, which satisfy assumptions of analysis of variance and multiple linear regression models.

A simple and commonly used conjoint model is the adding model. For three determinant attributes, the adding model can be written as follows (Louviere, 1988, p.16):

$$U_j = C + V(S_{1p}) + V(S_{2q}) + V(S_{3r}) \qquad (1.2)$$

where U_j is the consumer's overall utility for the jth product alternative; C is an additive constant; p, q, r are levels for attribute 1, 2, 3; S_{1p}, S_{2q}, S_{3r} are beliefs about the "position" of the jth alternative on attribute 1,2,3; $V(S_{1p})$, $V(S_{2q})$, $V(S_{3r})$ are part-worth utilities for the three attributes of the jth alternative.

Referring to equation (1.1), the overall utility a consumer has for a product can not be observed, rather it is assumed to be linearly related to a consumer's response on a category-rating scale. Therefore, substituting equation 1.1 and transposing, the adding model can be written as:

$$R_j = C + V(S_{1p}) + V(S_{2q}) + V(S_{3r}) + e_j \qquad (1.3)$$

This equation implies that a consumer's overall evaluation

(e.g., rating) for a product alternative is an additive function of the "true" but unknown part-worth utilities. In other words, consumers add the separate part-worth utilities to evaluate each alternative. The error term implies that analysis of variance or multiple linear regression can be used as the error theory to test the additive model(Louviere, 1988).

The adding model of conjoint analysis is used when there are no interaction effects among the selected attributes. If this is not the case, other models such as multiplicative, distributive and dual-distributive models may be used. The forms for these models are:

multiplicative: $U_j = C_0+C_1[V(S_{1p})V(S_{2q})V(S_{3r})]$ (1.4)

distributive: $U_j = C_0+C_1V(S_{1p})[V(S_{2q})+ V(S_{3r})]$ (1.5)

dual-distributive: $U_j = C_0+C_1V(S_{1p})+C_2V(S_{2q})V(S_{3r})$ (1.6)

where C_0 is the origin of the utility scale, C_{1-2} are scaling constants, and codes are as previously denoted.

The multiplicative model implies that all attributes are complements (interactions exist among all attributes). The distributive model represents the situation that one attribute complements the other two which are jointly independent. When one attribute is independent of the other two(S_{2q}, S_{3r}), but S_{2q} and S_{3r} are complements, the dual-distributive model is used. A general form which includes all of the above algebraic conjoint models is the multilinear model. It can be specified as (Louviere, 1988, p.22):

$$U_j = C_0 + C_1V(S_{1p}) + C_2V(S_{2q}) + C_3V(S_{3r}) + C_4V(S_{1p})V(S_{2q}) + C_5V(S_{1p})V(S_{3r}) + C_6V(S_{2q})V(S_{3r}) + C_7V(S_{1p})V(S_{2q})V(S_{3r}) \quad (1.7)$$

where all codes are as defined previously.

The multilinear model implies that attributes can be complements, substitutes or independent. Equations 1.3-1.6 are subsets of the multilinear model in which some constants(C) are equal to zero. In a conjoint analysis procedure, the researcher usually plots the data first to see what relationships or interactions exist among the variables. Then, an appropriate conjoint model is chosen. By calculating the marginal means of the respondent's data, or the corresponding regression coefficients, one can obtain estimates of the unknown "part-worth utilities" for each attribute and each level of the attribute (Louviere, 1988). From the part-worth estimates [$V(S_j)$], one can find the corresponding perception measures about the levels of the attributes used in the experiment.

The typical output from conjoint analysis is the utility scale (part-worth) of each attribute and each level of the attribute. Such results can be used to describe the degree to which each of the attributes is considered important by the respondent sample. The method measures important attributes rather than just salient attributes. By recognizing the important attributes, manufacturers can use the information

to modify their products' attributes so important attributes can be emphasized, to design new products that meet consumers' highest utility functions, and to develop market segmentation by grouping those consumers who have similar utility functions or preferences. Conjoint analysis also offers a tremendous potential for conducting cost/benefit analysis for many public policy decisions (Green & Srinivasan, 1978). For example, Parker and Srinivasan (1976) used conjoint analysis to determine the number, locations, and physical and operational characteristics of a set of health care facilities to be added to an existing health care delivery system, so as to maximize the incremental benefit to the community within cost constraints. Furthermore, conjoint analysis allows estimation of the trade-offs respondents make when evaluating various attributes together (Green & Tull, 1978). A typical example is the study conducted by Crown and Brown (1984) in which they studied consumers' trade-offs among flame retardance and other product attributes such as comfort and price. Finally, conjoint analysis has been suggested as a useful technique for determining consumers' preferences for apparel products made in different countries and the importance of country-of-origin in purchase decisions (Boeckman, 1986; Dickerson, 1987).

Consumers' Views about Imported Products

Since the early sixties, many researchers have explored

consumer attitudes toward foreign-made products and the influence of country-of-origin on buyer evaluation of products. This section reviews past studies that focus on consumer products in general as well as those specific to apparel products.

A. Consumer views about imported products in general

Studies in this category mostly focused on the image of various countries' products (Reierson, 1966; Nagashima, 1970, 1977; Gaedeke, 1973; Bannister & Saunder, 1978; Morello, 1984). Semantic differential scales were the most common method used to measure consumers' perceptions of different countries' products. Results of these studies indicated that country-of-origin does influence product evaluation. In a study of consumers' attitudes toward products made in developing countries, Gaedeke (1973) found that country-of-origin information did not significantly affect opinions about the quality of branded products in general. However, on a product-specific basis, attitudes toward well-known, branded products changed when respondents were given country-of-origin. Reierson (1966) found that American consumers tended to stereotype the quality of foreign products. Bilkey and Nes (1982) concluded from others' studies that consumers tended to evaluate their own country's products relatively more favourably than did foreigners. In addition, consumers' product evaluations were found to be related to their

perceptions of the source country's culture, degree of economic development and political system (Wang, 1978; Tongberg, 1972). Products from foreign countries perceived to have similar cultural, political and belief systems to those systems in the respondent's country were found to be more favourably evaluated than products from countries perceived to have different systems (Tongberg, 1972; Wang, 1978). It was also found that consumers' attitudes toward foreign-made products varied depending on the type of products (Nagashima, 1970; Gaedeke, 1973). A particular country could be ranked high for one product class and low for another. Nagashima's research (1970, 1977) compared American and Japanese consumers' attitudes toward foreign-made products as well as their attitudes in two different times. It was found attitudes toward foreign-made products differ among consumers from different countries and they are subject to change over time.

B. Consumers views about imported apparel products

Interest in investigating consumers' attitudes toward imported apparel products has increased in recent years, especially in the United States. Dickerson (1982) asked for consumers' views on imported versus domestic apparel. The majority of respondents reported awareness of country-of-origin when purchasing apparel products and expressed favourable attitudes toward domestic apparel. A lower

awareness level of the country-of-origin label was found, however, in a consumer intercept survey right after purchasing in shopping malls (Hester & Yuen, 1986). Research findings also showed that country-of-origin was not a determining attribute influencing consumers' purchases of apparel (Hester & Yuen, 1986; Mclean, Roper & Smother, 1986; Bergeron & Carver, 1988). Consumers' quality evaluations of domestic and imported apparel products have shown evidence of national bias. Gaedeke (1973) found students rated the quality of apparel products made in the United States considerably higher than those from developing countries. Dickerson (1982) found that consumers considered U.S.-made apparel to be of superior quality. Dardis et al. (1985), however, compared the actual price in real market places and examined quality differences in a laboratory component for imported and domestic men's dress shirts. Significant price differences were found, but no major quality differences existed.

There are fewer studies about Canadian consumers' attitudes toward Canadian-made versus imported apparel products. Stickl (1980) studied consumer attitudes toward Canadian-made sportswear items. She found that consumers had more favourable attitudes toward Canadian-made sportswear than toward sportswear made in other countries regarding the following apparel attributes: durability, comfort, ease of care, color, construction, fabric, fit and brand names. Consumers consistently had the least favourable attitudes

toward sportswear made in the far east countries. Wall and Heslop (1985; 1986) also found that consumers rated the quality of, and overall image of, apparel products made in low-cost countries lower than those made in developed countries (e.g., the U.S., France, Germany, Italy). Hester and Yuen (1986) conducted a consumer intercept survey in two locations of the United States and one location in Canada: Edmonton. About 25 percent of the Edmonton respondents claimed to be aware of the "made in" labels of the apparel items they had just purchased. Inconsistency was found between stated concern for buying Canadian and actual searching for Canadian goods when purchasing apparel products. In addition, research findings have indicated consumers did not consider the evaluative criterion, "made in Canada", as being of much importance when choosing apparel products. Consumers may not relate their favourable attitudes toward Canadian-made clothing to the label "made in Canada" when making purchase decisions (Stickl, 1980; Wall & Heslop, 1985; 1986; Hester & Yuen, 1986).

In the past, the majority of researchers have used mailed questionnaires, telephone interviews and consumer intercept interviews to ask consumers to indicate their attitudes toward and beliefs about products made in various countries. These survey methods usually measure attitudes toward one product attribute at a time, and thus are not multiattribute approaches. While findings were obtained from consumers' self

reports, researchers could hardly know what values consumers put on those unstated attributes. Therefore, Boeckman (1986) and Dickerson (1987) studied the importance of country-of-origin by using conjoint analysis. When consumers have difficulty in expressing what tradeoffs they make among apparel attributes when evaluating product alternatives, conjoint analysis is a useful method to determine and measure these tradeoffs. Boeckman (1986) studied the country-of-origin attribute jointly with five other apparel attributes: price, fit, color, fabric content, and style. Results showed that the country-of-origin attribute was not as important as the other five attributes in consumers' alternative evaluations. Since she used a small student sample, results may not be generalized. Dickerson (1987) designed a simulated shopping situation in which real garments were presented. Respondents were asked to evaluate eight dress blouses or shirts which varied on country-of-origin, price, care, style, and quality. Results indicated that respondents ranked the five garment attributes in this order of importance: country-of-origin, style, price, care and quality. It was surprising that country-of-origin was the most important apparel attribute while quality was found to be least important. The researcher indicated that the design of the experiment may have impact on the results. Country-of-origin labels put on by the researchers might have been too obvious on the garments. Since both studies (Boeckman,1986; Dickerson, 1987)

served the purpose of exploring conjoint analysis as a method to study the importance of country-of-origin attribute, further studies are needed to refine the method and to explore more extensively the relative importance of country-of-origin as a factor in consumers' apparel choices.

III. METHODS AND PROCEDURES

This chapter describes the research instrument, selection of sample, data collection and data analysis.

Research Instrument

The research instrument was composed of three parts: (1) a conjoint analysis task to measure consumers' preferences (Appendix C); (2) a perception scale to measure consumers' beliefs about important attributes of apparel products made in various countries (Appendix D); and (3) a group of questions including respondents' opinions about "buying Canadian", respondents' awareness of product country-of-origin and demographic background of the respondents (Appendix E). An explanation of the development of measures for each part follows.

A. Conjoint Analysis Procedures

In the conjoint analysis, respondents' simulated purchase choices of fleece sweatshirts were analyzed. The dependent variables were the respondent's utility values which, through conjoint analysis, were inferred from the evaluative ratings given by the respondent in a simulated choice exercise. The apparel attributes of price, quality and country-of-origin were the independent variables.

An initial step in carrying out the conjoint analysis is the selection of these product attributes and their levels. It had been suggested in the literature that for a full factorial design, a relatively low number of attributes is preferred to prevent respondent information overload. Three apparel attributes were chosen based on past research results: price, quality and country-of origin. Previous studies had found that price and quality were very important apparel attributes used by consumers. It had been shown that there were price differences between domestic apparel and imported apparel (Dardis et al, 1985). Also, consumers perceived quality differences between domestic and imported clothing (Stickl, 1980; Wall & Heslop, 1986). These results suggest that country-of-origin could have an influence on consumers' judgments and that tradeoffs among these attributes are expected.

After the attributes were selected, the levels for each individual attribute were determined. To ensure a manageable experiment, three levels for price and country-of-origin and two levels for quality were proposed. Prices were selected to represent realisticly low, medium and high prices for fleece sweatshirts. The levels for country-of-origin were Canada, the People's Republic of China and South Korea. Selecting Canada and China were based on the primary purpose of the study. The reason for choosing South Korea was that it has been a major competitor for both Canadian manufacturers

and Chinese exporters. Two levels of quality (high and low) represented differences in both fabric quality and the quality of garment construction. The high quality sweatshirt was made of a softer, heavier fleece fabric while a rougher, flimsier fabric was chosen for the low quality sweatshirt. The ribbing used in the high quality sweatshirt was more elastic than the one used in the low quality garment. The high quality sweatshirt was sewn by a four-thread serger, then topstitched with pink thread which matched the color of ribbing. The low quality sweatshirt was sewn using a three-thread serger. The standards of high and low quality were verified by an expert panel consisting mainly of professors who specialize in clothing construction and Department of Clothing and Textiles staff who are experienced sewers.

A full-factorial design was used for this study. The full-factorial design utilizes a complete set of different combinations of attribute levels. Each combination contains all the attributes, but differs from other combinations on at least one of the attribute levels. This study, using three attributes with three levels for two and two levels for the other generated a full-factorial design with 3*3*2 or 18 unique combinations (Table 1).

Ideally, eighteen actual sweatshirts varying in levels of different attributes would be used as stimulus presentations. However, because of limited resources, cards containing the following four elements were used to substitute

Table 1. Experimental Attributes and Levels

Attributes	Levels 1	2	3
Price	$19.95	$24.95	$29.95
Country-of-origin	Canada	China	South Korea
Quality	High	Low	
Total Combinations = 3 * 3 * 2 =18			

for real garments: a photograph of the garment, a swatch representing the fabric and construction quality, a realistic garment label and a price tag. The swatch showed the upper part of the bodice. A low quality and a high quality garment were sewn first, holding factors such as style, color, fiber content, size and care information constant. Photographs were then taken of each and put on to the presentation cards along with each of the other elements.

The presentation cards were made in such a way that price, quality and country-of-origin varied while other factors were held constant. Respondents were asked to rate each garment choice on a scale of 1 to 100, with 1 indicating "definitely would not buy" and 100 indicating "definitely would buy" (Appendix C). Respondents could choose any number from 1 to 100 according to their evaluations of each garment choice. The bigger the number assigned to a garment, the more likely the respondent would buy it.

Two questions following the choice experiment were designed to check the validity of the conjoint analysis. Respondents were asked to give reasons for selecting the highest rated garment and for rejecting the lowest rated one.

B. The perception Scale

A 7-point perception scale was used to determine Canadian consumers' beliefs about important attributes of apparel items made in various countries. Such beliefs are often referred to as country images (Jaffe & Nebenzahl, 1984). Most image studies have employed this type of scale (Bannister & Saunder, 1978; Nagashima, 1970; 1977). Product images of five countries were measured in this study: Canada and the four major apparel exporting countries--Taiwan, South Korea, Hong Kong and China. Respondents were asked to rate five countries' apparel products on each of these important attributes: quality, price, style and fit. The descriptors on the two ends of the four attributes were respectively: high-low, expensive -inexpensive, fashionable-not fashionable and appropriate -inappropriate.

C. Background Information

Some general questions followed the conjoint analysis and country image rating. The first two questions were designed to learn consumers' opinions about buying Canadian products to support domestic industries. Then, questions about the

respondents' awareness of country-of-origin when purchasing apparel products followed. The final part of the questionnaire was to obtain demographic data, including age, education level completed, and ethnic background of respondents.

Selection of Sample

The population of interest for this study was female adults who were over 18 years of age and were Canadian residents. The restrictions concerning age and Canadian residency were made, since it was necessary to have respondents who had clothing purchasing experience, especially in the Canadian market. However, people under 18 years old were considered eligible for inclusion in the sample if they had purchased their own apparel items for at least a year. To obtain a sample, it was planned to conduct consumer intercept interviews in commercial locations such as West Edmonton Mall, Edmonton Center and HUB mall, so that a sample from varied economic and geographic locations in the Edmonton area as well as some visitors from other places might be obtained. Since applications for permission to approach consumers in West Edmonton Mall were unsuccessful, the final sample was obtained mainly through consumer intercept interviews in HUB mall on the University of Alberta campus, and in the Millwoods Recreation Center. In order to get a reasonably large sample, the researcher also interviewed some

support staff at the University of Alberta.

Data Collection

A pilot study was conducted prior to collecting data in order to test experimental measures and procedures. Twelve students enroled in a textile science class volunteered to participate in the pilot study. Results indicated no problems either with the questionnaire design or respondents' understanding of the conjoint experiment instructions. The average time to complete the experiment was determined to be fifteen minutes. An undergraduate student who assisted the researcher in data collection was trained during the pilot study.

The simulated shopping situation was set up in places where interviews were conducted. A poster was made with a message, "Win a Sweatshirt", to attract attention. Each participant was given an opportunity to enter a draw to win the sweatshirt of her choice. People were approached by asking if they would volunteer to participate in a study about how consumers make purchase decisions when buying sweatshirts (see interview guide in Appendix A). If a person agreed to participate, she was given a consent form (Appendix B) to read and sign. The consent form gave participants more information about the study and assurance that any information provided by them would be kept confidential. No information was given

to participants to make them aware of the research objectives or country-of-origin issue. Respondents were first asked to pretend that they were shopping for fleece sweatshirts for themselves. Eighteen unique cards were randomly organized on a table in front of respondents. Respondents were told that each card represented a garment choice. They were to review the 18 garment choices and then to rate them according the likelihood of purchase, as outlined earlier.

After completing the conjoint exercise, respondents were asked to briefly write the reasons for those highest and lowest rated garments. Respondents were not shown the content of the rest of questionnaire prior to or during the conjoint experiment, so that their evaluation of garments would not be influenced or biased. Then, respondents were given the perception scales for the belief measurement. They were asked to place a check mark on the space that best described their beliefs about apparel products made in each country. Finally, respondents were asked to answer the rest of the questions. The complete exercise took approximately 20 minutes.

Data Analysis

The conjoint (regression) analysis of data was completed using the "SYSTAT" package for microcomputers. The remaining data analyses were conducted in the University of Alberta's mainframe computer using the SPSS^{X} package (SPSS^{X} User's Guide,

1986). Background data about the sample were described using frequencies, means and standard deviations. Respondents' opinions about supporting domestic industries and their awareness of country-of-origin of garments were described using frequencies and crosstabulations. Frequencies of various reasons for selecting the highest and lowest rated garments were also calculated.

Table 2 summarizes the statistical analyses performed for hypotheses testing.

Null hypotheses 1 & 2: The measured values for the belief components were determined by responses to scale items and described by means. Utility values for each country were calculated through regression coefficients obtained from the conjoint analysis model. Differences among respondents' beliefs about and utility values for apparel items made in different countries were determined using analysis of variance through the UANOVA program of SPSS^{X} package, which does both analysis of variance and multiple comparisons.

Null hypothesis 3: Multiple regression was used to decompose respondents' ratings for the garment choices into part-worth components for each attribute. The importance of each attribute was determined by the mean coefficient of the attribute. Significant difference in importance of various attributes on overall utilities were tested through the UANOVA program.

Null hypothesis 4: Relationships between beliefs and utility

values were determined through Pearson product-moment correlation analysis. Multiple regression was used to test if several beliefs together could explain variance in the utility values.

Null hypothesis 5 & 6: Differences in beliefs and utilities among respondents who differ in opinions, awareness of countries-of-origin and background information were determined through analysis of variance and Scheffe multiple comparisons.

Table 2. Summary of Statistical Analysis

Null Hypothesis	Statistical Analysis	Test
1	U A N O V A	differences in consumers' beliefs among countries
2	U A N O V A	differences in consumers' utilities among countries
3	REGRESSION U A N O V A	differences in weight of each attribute
4	REGRESSION PEARSON'S CORRELATION	relationships between beliefs and utilities
5	A N O V A , S C H E F F É	differences in beliefs among demographic groups
6	A N O V A , S C H E F F É	differences in utilities among demographic groups

IV. FINDINGS

This chapter includes a description of the sample, descriptive analysis of the variables, and testing of six hypotheses.

Description of the Sample

A total of 106 female consumers voluntarily participated in the choice experiment and completed the questionnaire. The majority of them were from the city of Edmonton, ten from towns close to Edmonton and two from the Province of British Columbia. Since HUB Mall (University of Alberta) and Millwoods Recreation Center are located in the south and the southeast of the city, the majority of respondents (70%) were from these areas.

Table 3 outlines a demographic profile of the subjects. Wide distributions were found among participants in age, education, and ethnic background. Subjects ranged in age from 15 years to 64 years, while those aged 18 to 49 years comprised 88.6 percent of the whole sample.

Respondents' years of schooling ranged from those who had not completed high school to those who had obtained post-graduate or professional degrees. The educational level most frequently indicated by the sample was some college or university. People who had graduated from college or university were also well represented (27.4%). It appears

Table 3. Frequency and Percentage Distribution of Repondents' Age, Education and Ethnic Background

Variable	Frequency	Percent
Age		
15-17	7	6.6
18-24	28	26.4
25-34	33	31.1
35-49	33	31.1
50-64	4	3.8
missing	1	.9
Total	106	100.0
Education		
7-11 years	10	9.4
Graduate high school	15	14.2
Some college or univ.	42	39.6
Graduate college/univ.	29	27.4
Graduate or professional	10	9.4
Total	106	100.0
Ethnic background		
British	26	24.5
European	27	25.5
Asian & Other developing countries	14	13.2
Canadian	39	36.8
Total	106	100.0

that university/college students were slightly overrepresented due to part of the sample being obtained in HUB Mall, the University of Alberta's commercial outlet located on campus. However, students are a large segment of sweatshirt consumers, and thus are appropriate as participants in the sweatshirt

choice experiment.

Twenty three different ethnic origins were indicated by respondents. These were grouped into four categories: British, European, Asian and Canadian (Table 3). The largest group was "Canadian" (36.8%), representing native Canadians and Canadians with multi-origin ethnic backgrounds. British subjects included English, Scottish and Irish, while the European origin group included all other countries in Europe. The fourth group, mostly Asians, but which also included two respondents with Latin-American and African origins, was the smallest group, with 13.2%.

The demographic data were compared with that reported in 1986 census data for the city of Edmonton (Statistics Canada, 1986). The 18 to 24 age group was over represented while the 50 to 64 age group was underrepresented. For Edmonton city, 52% of the female residents had a highest education level of "some high school" or "graduated high school" while only 23.6% of the respondents in the present study were in this category. Respondents who had achieved university /college degrees or higher (36.8%) were overrepresented compared to 11% of Edmonton women who had this level of education. Data on ethnic background were compared to the whole population of Edmonton since data for females could not obtained. Approximately 19% of residents in Edmonton have European ethnic backgrounds while 25.5% of respondents in the study have this ethnic origin. Respondents who have Asian ethnic

backgrounds were underrepresented compared to 19% of the population in Edmonton. However, women who are "25 to 34 years of age", or have "some college/university education", or have British or Canadian ethnic backgrounds were well represented in the sample. Therefore, the sample can be considered a representative sample of women in these categories.

Descriptive Analysis of the Variables

Mean ratings for each sweatshirt profile are presented in Table 4 and ranged from 18.1 to 77.6. Garment E (high quality, made in Canada, and low price) was given the highest mean rating. The lowest rated garment was L, which was low quality, made in South Korea and high priced. The mean ratings for all garments made in each of Canada, China and South Korea, regardless of quality and price, were respectively 45.6, 42.4, and 41.5.

After respondents completed the choice experiment, they were asked to write down reasons for rating garments highest and lowest. This information is summarized in Table 5, using multiple responses. Garment quality, reflected through softer, heavier material, high quality of sewing, neat appearance and finishing, was most frequently indicated by respondents as the reason for giving the highest rating. Reasonable price had the second highest response while the

Table 4. Mean Ratings for Sweatshirt Profiles

Garment	Attribute Combinations			Mean Ratings[a]
	Quality	Country-of-origin	Price	
E	High	Canada	$19.95	77.6
F	Low	South Korea	$19.95	31.4
G	High	South Korea	$29.95	48.2
H	Low	Canada	$24.95	25.8
I	High	China	$24.95	57.4
J	High	Canada	$29.95	51.5
K	Low	China	$29.95	19.7
L	Low	South Korea	$29.95	18.1
M	High	China	$29.95	50.7
N	Low	Canada	$19.95	36.0
O	High	South Korea	$19.95	70.7
P	Low	China	$19.95	33.5
Q	High	Canada	$24.95	60.5
R	High	China	$19.95	71.4
S	Low	Canada	$29.95	22.7
T	Low	South Korea	$24.95	25.1
U	Low	China	$24.95	22.2
V	High	South Korea	$24.95	55.5

[a] One indicates "definitely would not buy" while one hundred means "definitely would buy".

Table 5. Reasons for the Highest and Lowest Ratings

Reasons	Frequency	Percent
For the highest rating:		
Softer heavier material	86	31.3
High quality of sewing	44	16.0
Neat appearance and finishing	36	13.0
Good price	78	28.4
Made in Canada	30	10.9
Made in Korea	1	.4
Total	275	100.0
For the lowest rating:		
Rough flimsy material	76	32.9
Poor quality of sewing	45	19.5
Rough appearance and finishing	31	13.4
High price	62	26.8
Made in foreign countries	17	7.4
Total	231	100.0

country-of-origin (e.g., made in Canada) was the third factor. Reasons for the lowest rating, on the other hand, were most heavily represented by factors reflecting low garment quality. High price and made in foreign countries were the second and the third frequently mentioned reasons.

Table 6 shows respondents' opinions about these two statements:

(1) People should buy Canadian-made products to support

domestic industries.

(2) Consumers should spend their dollars to get the maximum value, regardless where a product was made.

The majority of responses to both statements were "agree" or "somewhat agree". Responses for the first statement, however, were more toward the "agree" side, while those for the second statement were more extreme and somewhat more polarized at the two ends of the scale.

Table 6. Respondents' Support of Domestic Industries

	Frequency (Percent)				
	Agree	Somewhat agree	Neither	Somewhat disagree	Disagree
Buy Canadian-made products to support domestic industries	38 (35.8)	49 (46.2)	13 (12.3)	6 (5.7)	0 (0.0)
Spend dollars to get maximum value	46 (43.4)	36 (34.0)	8 (7.5)	10 (9.4)	6 (5.7)

Total=106

Respondents also reported their awareness of country-of-origin when they purchased apparel items. Table 7 presents a crosstabulation of reported awareness of country-of-origin on apparel items in general and on the sweatshirt samples. Most frequently (45.2%), respondents reported they sometimes noticed the "made-in" labels on garments. About 41% of subjects stated they often noticed where garments were made

when they were buying them. Only a few people (13.5%) said they never noticed country-of-origin of garments when shopping. Respondents were then asked if they noticed the country-of-origin of the sweatshirt samples when they were participating in the choice experiment. Nearly half of them (44%) said they noticed the "made-in" labels of the sample on purpose, while one third of the respondents said they did not notice them. The rest of the sample (22.1%) reported that they happened to notice the country-of-origin labels on sweatshirt samples.

Table 7. Country-of-origin: Crosstabulation of Reported Awareness by Notice of Label on Samples

Reported awareness of labels on garments	Notice Labels on Samples: Did not notice	Happened to notice	Noted on purpose	Row total (%)
Often	12	4	27	43 (41.3)
Sometimes	14	17	16	47 (45.2)
Never	9	2	3	14 (13.5)
Column total (Percent)	35 (33.7)	23 (22.1)	46 (44.2)	104 (100)

Chi-Square=18.41 p=.001

The awareness of labels on samples was less frequent than reported awareness on apparel items in general. Chi-square test results (Table 7), however, indicated that there was a significant association between reported notice of labels on garments in general and on the sweatshirt samples. Respondents who reported often noticing "made-in" labels on garments were most likely to note on purpose the country-of-origin of the sweatshirt samples, while those who said "never" noticed, more likely did not notice at all. Those who "sometimes" noticed labels when purchasing garments were almost equally divided into different levels of awareness of sample labels.

There were also significant associations between respondents' opinions supporting Canadian industries and their awareness of country-of-origin of garments and sweatshirt samples (Table 8). Respondents who strongly agreed to support of Canadian industries were also the major group who said they often noticed the country-of-origin of garments and noticed "made-in" labels on sweatshirt samples purposefully. Those who reported that they sometimes noticed country-of-origin of garment, or happened to notice "made-in" labels on sweatshirt samples were more likely to say that they somewhat agreed to buy Canadian products to support Canadian industries. There were, however, several respondents who expressed their support of Canadian industries but reported they never noticed country-of-origin of garment, and/or did not notice the labels on sweatshirt samples.

Table 8. Crosstabulation: Support Canadian Industries by Awareness of Country-of-origin

	Support Canadian Industries			
	Agree	Somewhat agree	Neutral or Somewhat disagree	Total (%)
Notice labels on Garments				
Often	24	13	6	43 (40.6)
Sometimes	8	28	12	48 (45.3)
Never	6	8	1	15 (14.2)
Column total (%)	38 (35.8)	49 (46.2)	19 (18.0)	106 (100)
Chi-Square=16.62 p=.002				
Notice labels on Samples				
Noted on purpose	23	17	6	46 (44.2)
Happened to notice	3	12	8	23 (22.1)
Did not notice	12	19	4	35 (33.6)
Column total (%)	38 (36.5)	48 (46.1)	18 (17.3)	104 (100)
Chi-Square=12.57 p=.01				

Testing of the Null Hypotheses

Null Hypothesis 1: There will be no significant differences among consumers' beliefs about apparel items made in different countries regarding quality, price, style and fit.

Analysis of variance and multiple comparisons were used to determine if differences in beliefs existed among different countries at the level of significance $p < .05$. Table 9 summarizes the mean response on beliefs about each product attribute for each country. Letters beside the means indicate that those with the same letters do not differ from each other significantly, while those with different letters are significantly different at $p < 0.05$. Figure 2 provides a visual illustration of the differences in beliefs among various countries.

Table 9. Analysis of Variance: Beliefs and Utilities for Garments Made in Different Countries

	MEAN BELIEFS				MEAN
COUNTRY	Quality	Price	Style	Fit	UTILITY
Canada	4.76 A[a]	4.49 C	4.57 A	4.59 A	2.45 A
China	3.28 B	2.21 BA	3.67 CB	3.04 BC	-0.71 B
Taiwan	2.40 C	1.87 A	3.13 C	2.43 C	-----
Hong Kong	3.26 B	2.63 B	4.09 BA	3.16 B	-----
South Korea	2.85 BC	2.16 BA	3.41 C	2.87 BC	-1.74 B

[a] Letters indicate beliefs and utilities for which means do not significantly differ at $p<.05$.

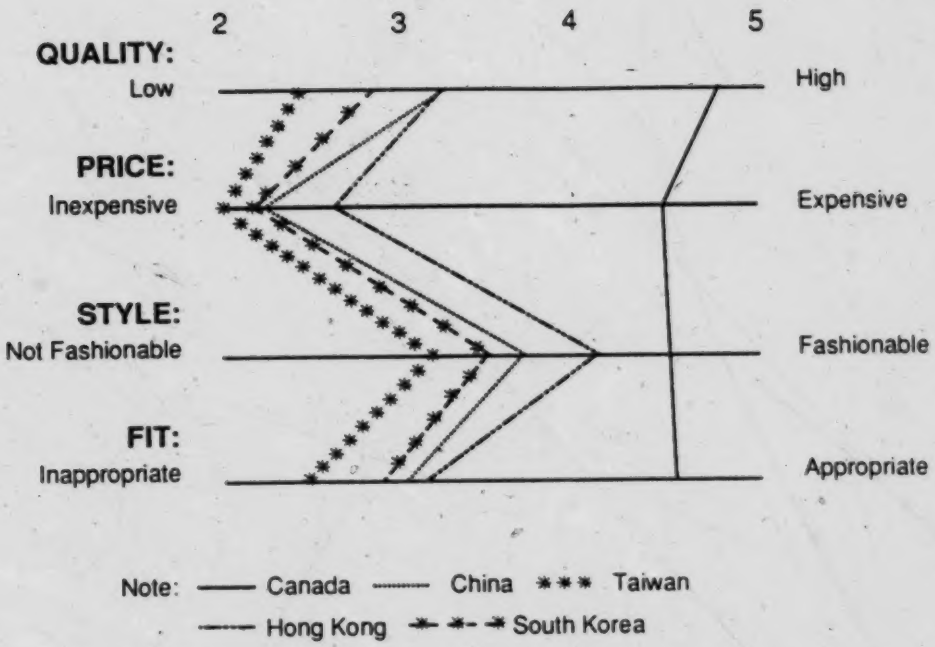

Figure 2. Mean Beliefs about Garments made in Canada, China, Taiwan, Hong Kong and South Korea

Respondents' beliefs about quality of apparel products made in Canada were significantly different from all the other low-cost countries, with a mean of 4.76. Quality of garments made in Canada was perceived the highest, with China, Hong Kong, South Korea and Taiwan following respectively. Beliefs about quality of garments made in China, Hong Kong and South Korea did not differ from each other significantly, while China and Hong Kong were perceived to be different from Taiwan. However, there were no significant differences on

respondents' perceptions of garment quality between Taiwan and South Korea.

Significant differences were found in mean beliefs about price of apparel products between Canada and the four low-cost countries. Canadian products were perceived as most expensive, followed by Hong Kong, China, South Korea and Taiwan respectively. Respondents' beliefs about price of apparel products made in Hong Kong were significantly different from those of Taiwan, but price perceptions of either of these two countries did not differ significantly from those of China or South Korea.

For beliefs about style of garments, Canada and Hong Kong were in the leading position and did not differ from each other significantly. Styles of products from China, Taiwan, and South Korea were not perceived to be significantly different, nor were those from China perceived to differ from Hong Kong styles. Again, significant belief differences about style were found between Canadian products and products of all low-cost countries except Hong Kong.

Finally, significant differences in beliefs about garment fit were found between Canada and all the other countries; and between Hong Kong and Taiwan. Neither Hong Kong nor Taiwan, however, differed significantly from China or South Korea.

Since significant differences were found among different countries in beliefs about quality, price, style and fit of apparel products, null hypothesis 1 was rejected.

Null Hypothesis 2: There will be no significant differences among consumers' part-worth utilities for sportswear items made in Canada, China and South Korea.

Analysis of variance and multiple comparisons indicated that respondents' utilities for Canadian apparel products were significantly different from those of China and South Korea (Table 9). Respondents had the highest utilities for "made-in Canada" label but negative utilities for labels of the two low-cost countries. Utilities for products made in China were slightly higher than those of South Korea, but this difference was not significant. As significant differences were found between Canada and the other two countries, null hypothesis 2 was rejected.

Null Hypothesis 3: There will be no significant difference in importance of quality, price and country-of-origin in consumers' purchase decisions for sportswear.

On examining the results in Table 10, the t-test statistic shows that the regression coefficients of three main effects (quality, price and country-of-origin), the quadratics of price and country-of-origin, and the two-way interaction between quality and price are significantly different from zero at .001 level. The three-way interaction among quality, quadratics of price and country-of-origin are significant at $p<.05$. That the quadratics of price and country-of-origin are significant indicate that the relationships between consumers' overall utilities and the price or country-of-origin are non-

linear (Figure 3). Figure 3 shows that increasing price had a negative impact on utilities, but the effect was mitigated at higher price levels; that is, a $5 increase from $19.95 to $24.95 had a greater effect on utilities than a $5 increase from $24.95 to $29.95. The results also show that quality had positive effects on overall utilities while price had a negative effect on the dependent variable as expected. Judging from the magnitudes of the coefficients of the three main effects (Table 10), it is seen that the variable of quality, with the coefficient of 17.16, has the strongest effect on consumers' overall utilities for the apparel item. This indicates that 1 unit increase in quality would cause 17.16 units increase in consumers' utilities; while 1 unit change in price only causes 9.15 units change in consumers' utilities. Since the variable of country-of-origin has the coefficient of 1.50, the effect of this variable on the dependent variable (overall utility) is relatively small. Analysis of variance indicated that the effect of quality on consumers' overall utility values for the sweatshirt was significantly greater than those of price or country-of-origin; and the effect of price on overall utilities was significantly greater than country of origin. Therefore, compared to the effects of quality and price, the country-of-origin variable is not as important in consumers overall utilities for sportswear items. Thus, null hypothesis 3 was rejected.

Table 10. Multiple Regression: quality, price and country-of-origin on Overall Utilities

Attributes	Mean Coefficients	Std. error	t-value
Quality	17.16	1.15	14.92***
Price	-9.15	0.97	-9.43***
Country	1.58	0.44	3.59***
$Country^2$	0.87	0.21	4.14***
$Price^2$	1.07	0.24	4.46***
QualityxCountry	0.08	0.35	0.23
QualityxPrice	-2.40	0.55	-4.36***
CountryxPrice	-0.61	0.37	-1.65
QxCxP	-0.72	0.39	-1.85
$QualityxCountry^2$	0.27	0.18	1.50
$QualityxPrice^2$	0.23	0.22	1.05
$Country^2xPrice$	-0.10	0.18	-0.56
$CountryxPrice^2$	-0.04	0.23	0.17
$Country^2xPrice^2$	0.23	0.13	1.77
QxC^2xP	-0.06	0.21	0.29
$QxCxP^2$	0.11	0.21	0.50
QxC^2xP^2	-0.24	0.11	2.18*

*** p<.001
* p<.05 (Q, C, P refer to quality, country and price)

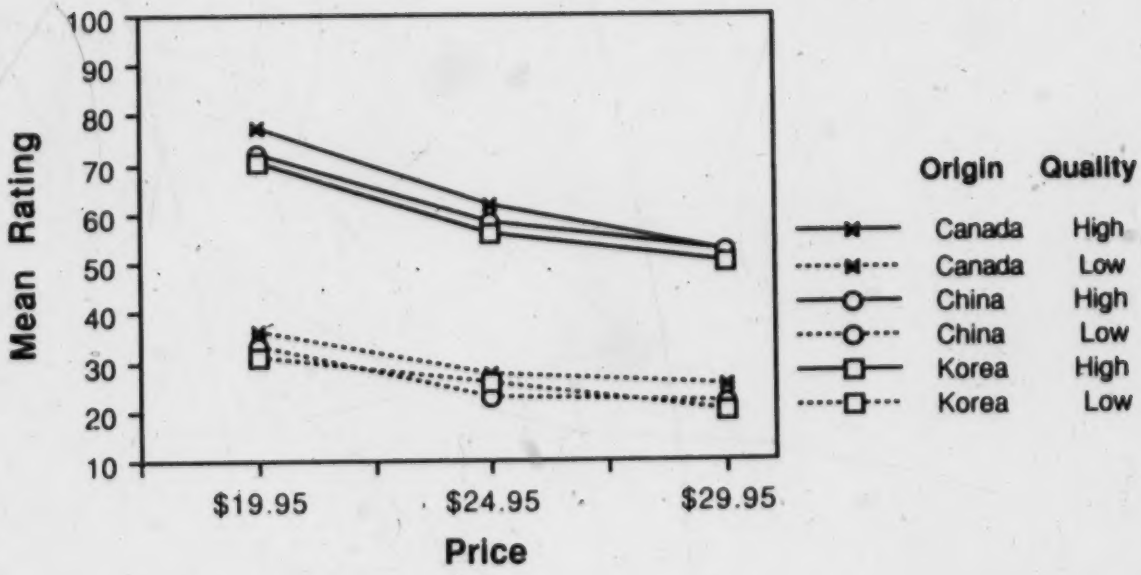

Figure 3. The effects of quality, price and country of origin in sportswear purchases

Null Hypothesis 4: There will be no significant relationships between consumers' beliefs about apparel items from specific countries and their part-worth utilities for sportswear from such countries.

Pearson correlation coefficients between respondents' utility values for and beliefs about garments made in different countries (Canada, China and South Korea) are shown in Table 11. The test results have taken all three countries into consideration together in the five variables: utility, quality, price, style and fit. Every belief variable (quality, price, style and fit) was significantly related

Table 11. Pearson correlation coefficients between Utilities for and Beliefs about Garments made in Different Countries

	Beliefs			
	Quality	Price	Style	Fit
Total Sample	r=.3211 p<.001	r=.2372 p<.001	r=.1510 p=.006	r=.2656 p<.001
Who noticed Made-in labels on Samples)	r=.3937 p<.001	r=.3149 p<.001	r=.1989 p=.003	r=.3351 p<.001

with the utility values at .01 level, for both the total sample and the group who were aware of the country-of-origin of the sweatshirt samples. Stronger relationships were found when only considering those respondents who noticed "made-in" labels on samples. In both cases, the quality belief had the

strongest, while the style belief showed the weakest relationships with utility values.

Multiple regressions were also performed to test if belief variables could explain the variance in respondents' utility values for garments made in various countries. Taking all countries (Canada, China and South Korea) into consideration, the total model and the contribution of the quality belief were both significant beyond .001 level. Contributions of beliefs about price, style and fit were not significant. On the basis of both the Pearson correlations and regression analyses, null hypothesis 4 was rejected.

Null Hypothesis 5: There are no significant differences in beliefs about garments made in different countries among respondents who differ on awareness of country-of-origin, opinions about buying Canadian products, and ethnic backgrounds when controlling for age and education.

Three-way analysis of variance was used to test Hypothesis 5, with age and education treated as covariates. Table 12 summarizes the F values for the main effects and the covariates. Several significant differences were observed at .05 or .10 levels. Respondents with various levels of awareness of country-of-origin were significantly different in beliefs about quality of garments made in Hong Kong and price of garments from Taiwan ($p<.05$), and quality of garments made in Canada or Taiwan as well as price of garments from China ($p<.10$). However, the analysis did not yield

Table 12. ANOVA: Beliefs and Utilities for Respondents Differing in Awareness, Support of Domestic Industries and Ethnic Background

Dependent Variables	F VALUES: Independent Variables			Covariates	
	Awareness	Support	Ethnicity	Age	Education
Beliefs:					
QCAN	3.13+	0.68	1.61	0.08	0.00
QCHI	1.21	1.63	1.03	6.17*	1.13
QTW	2.54+	0.56	0.36	0.95	3.14+
QHK	3.24*	0.07	2.40+	0.17	0.00
QSK	0.36	0.41	2.68+	0.04	0.01
PCAN	0.64	1.58	1.49	2.84+	0.32
PCHI	2.70+	2.05	2.79*	2.32	0.29
PTW	3.81*	1.01	1.63	0.05	0.01
PHK	2.31	0.62	1.96	1.22	0.22
PSK	1.92	0.19	3.39*	1.37	0.04
SCAN	1.73	0.25	1.43	0.02	0.90
SCHI	0.05	1.52	2.89*	1.51	0.15
STW	0.28	0.48	1.44	0.25	1.68
SHK	1.72	0.21	0.57	0.43	0.18
SSK	1.65	0.95	0.90	0.52	0.03
FCAN	1.29	0.56	2.81*	0.07	0.97
FCHI	0.14	1.22	2.63+	1.48	1.09
FTW	0.36	0.42	2.29+	0.00	0.02
FHK	0.53	0.57	1.94	0.01	0.00
FSK	0.32	0.29	2.13	0.07	0.00
Utility					
Canada	5.18*	2.40	0.59	3.46+	0.06
China	3.22+	1.23	1.54	3.02+	0.05
Korea	2.94*	2.43+	0.13	1.39	0.29

* $p < .05$ (See Table 13 for Scheffe Multiple Comparisons)
\+ $p < .10$ (See Table 13 for Scheffe Multiple Comparisons)

significant differences among respondents who differed in opinions about supporting domestic industries. Belief differences among consumers with different ethnic backgrounds were also observed ($p<.05$) for price of apparel products from China or South Korea, style of garments made in China and fit of Canadian-made garments; as well as for quality of garments made in Hong Kong or South Korea, and fit of garments from China and Taiwan ($p<.10$).

Age was a significant covariate in the analysis of beliefs about quality of garments made in China ($p<.05$) and price of Canadian-made apparel products ($p<.10$). Education was only significant for quality of garments made in Taiwan ($p<.10$).

Scheffe multiple comparisons were performed for those significant variables shown in Table 12. Since the Scheffe test is more restrictive, only 9 out of 16 variables showed significant differences at .10 level (Table 13). Respondents who noted the "made in" label on the sweatshirt sample on purpose were more likely to rate the quality of Canadian garments high than those who did not notice the country-of-origin labels. Respondents who happened to notice labels on sweatshirt samples were more likely to rate the quality of garments made in Hong Kong high than those who did not notice the made-in labels. Significant differences in beliefs about quality of garments made in Hong Kong were also observed between respondents with British and Asian ethnic backgrounds.

Table 13. Scheffé Multiple Comparison[a] of Significant Differences in Beliefs and Utility Means

Independent Variables	Mean Beliefs: Quality			Price			Fit		Mean Utilities		
	Canada	China	Hong Kong	China	Taiwan	Korea	Canada	Taiwan	Canada	China	Korea
Awareness											
Didn't notice	4.43 B		2.90 B	2.60 A	2.10 BA				0.04 B	0.45 A	-0.49 A
Happened to notice	4.68 AB		3.84 A	2.85 A	2.78 A				2.28 AB	-0.69 AB	-1.59 AB
Noted on purpose	5.01 A		3.21 BA	1.58 B	1.77 B				4.30 A	-1.60 B	-2.71 B
Ethnic Background											
British			2.75 B			2.43 AB	4.35 ABC	2.39 AB			
European			3.32 AB			1.60 B	5.15 AC	1.79 B			
Asian			4.08 A			3.09 A	3.43 B	3.55 A			
Canadian			3.21 AB			2.00 AB	4.81 C	2.84 AB			
Age											
below 24		3.65 A									
25-34		3.52 A									
35-64		2.53 B									

[a]For all comparisons reported in this table, $p<.10$.

Those people of Asian-origin rated the quality of garments made in Hong Kong higher than those with British origins. Finally, beliefs about quality of garments from China were significantly different among different age groups. Younger people rated the quality of garments from China higher than those who were over 35 years of age.

Significant differences in beliefs about price of garments from China were found between people who did not notice or happened to notice labels on sweatshirt samples and those who noted labels on purpose. Respondents who noted labels on purpose were more likely to think that garments from China are inexpensive than those who did not notice or happened to notice labels. For prices of garments from Taiwan, respondents who noted the labels on purpose were significantly more likely to rate them as inexpensive than those who happened to notice labels. Beliefs about prices of garments from South Korea were significantly different between respondents with European and Asian ethnic backgrounds. Asian-origin people rated prices of garments from South Korea more expensive than did those with European backgrounds.

Beliefs about fit of garments made in Canada were significantly different between people with European or Canadian ethnic backgrounds and those with Asian backgrounds. The former were more likely to believe that the fit of Canadian garments was appropriate for them, while the Asian-origin people were more likely to think that the fit of

Canadian garments was not appropriate for them. Respondents with Asian ethnic backgrounds, however, were significantly more likely to believe that the fit of garments made in Taiwan was appropriate for them than were those with European origins. Since beliefs differed significantly for only some of the independent variables, null hypothesis 5 was partially rejected.

Null Hypothesis 6: There are no significant differences in part-worth utilities for Canada, China and South Korea among respondents who differ on awareness of country-of-origin, opinions about buying Canadian-made products and ethnic backgrounds, when controlling for age and education.

This null hypothesis was tested using the same analyses as for Hypothesis 5, and results are also shown in Tables 12 and 13. Respondents who differed in awareness of country-of-origin were significantly different at .05 level in utilities for garments made in Canada, China and South Korea. As shown in Table 13, significant differences were observed between those who did not notice the made-in labels on sweatshirt samples and those who noted on purpose. Respondents who did not notice the country-of-origin of garments, had almost neutral (near zero) utility values for garments made in all three countries. Those who noted labels on purpose, however, had much higher utility values for garments made in Canada, and much lower and negative utilities for garments made in China and South Korea.

Respondents who had different opinions about buying Canadian products to support domestic industries were significantly different in utilities for garments made in South Korea ($p<.10$). Moreover, utilities for garments made in Canada or China were significantly different among different age groups ($p<.10$). However, Scheffe multiple comparisons did not indicate which groups differed significantly.

No significant differences in utilities for garments made in three different countries were found among respondents with different ethnic backgrounds or different education levels. Thus, null hypothesis 6 was only partially rejected.

V. DISCUSSION

This chapter will examine the findings outlined in Chapter 4 in relation to the purpose and objectives of the study, the literature reviewed and the conceptual framework, which includes the Engel, Kollat and Blackwell (EKB) model of consumer decision process and Anderson's information integration theory.

The overall purpose of the study was to determine Canadian consumers' beliefs about and preferences for apparel products made in Canada and some of the low-cost countries, and to determine the importance of the country-of-origin attribute relative to other product attributes such as quality and price in the consumer's purchasing decisions.

A. Measurements of Consumers' Beliefs

The first objective of the study was to determine Canadian consumers's beliefs about apparel items made in Canada, China, Taiwan, Hong Kong and South Korea regarding quality, price, style and fit.

Canadian apparel products were rated noticeably higher in quality, style and fit than products from any of the four low-cost countries. It was believed that garments made in Canada are of higher quality, are more fashionable and fit better than those made in China, Hong Kong, Taiwan or South Korea. These findings support those of Wall and Heslop (1985,

1986) and Stickl (1980) in that they found Canada holds a very strong positive position in the quality domain. Consumers also believed that Canadian apparel products are the most expensive compared to the products of low-cost countries. Stickl (1980) also reported that price was a competitively weak area for Canadian clothing.

Quality of garments made in China and Hong Kong were believed to be similar. Clothing from China was rated the highest for quality among the four low-cost countries, next to Canadian products. Bergeron and Carver (1988) also found similar perceptions of college students. Style and fit of garments made in China were believed to be better than those made in South Korea and Taiwan, ranking in the third position. Consumers in Canada or the United States may not be too familiar with ready-to-wear garments from China. Exporting ready-to-wear garments only emerged in recent years, but still in lower quantity than those from the "big three". In fact, in the real market, it may not be true that garments from China are of higher quality than those from Hong Kong, South Korea and Taiwan, and more fashionable, better fitting or higher price than those made in South Korea or Taiwan. Consumers' beliefs about garments made in China, however, may be influenced by their favourable attitudes to the country. Bannister and Saunders (1978) stated that a general image of a country created by variables such as representative products, economic and political maturity, historical events

and relationships, traditions, etc. will have effects upon consumers' images of products from the country. China is the largest and oldest country among the four low-cost countries. Its old culture and long history, plus the recent open-door policies, economic reform and improved relationships with North American countries[1], may create a positive image among Canadian and American consumers.

Clothing made in South Korea was perceived to be quite similar to that of China and Hong Kong except in style, rating less fashionable than clothing from Hong Kong and China. Garments from Taiwan were given the lowest ratings in each of the four attributes, but were not perceived to be significantly different from those of South Korea on any attribute.

Overall, Canadian apparel products stood out from products of low-cost countries, characterized as high quality, expensive, fashionable and having good fit. Consumers' beliefs about clothing from the four low-cost countries were similar for some attributes, but variations did occur among those countries. In general, garments made in Hong Kong and China were perceived to be of higher quality, more fashionable and better fit, but more expensive than those of South Korea and Taiwan.

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[1] Data for this study were collected prior to the May, 1989.

B. Analysis of the Conjoint Model

The second and third objectives were to determine consumers' utility values for sportswear made in Canada, China and South Korea and the relative importance of country-of-origin on consumers' purchase decisions. These objectives were achieved through analyzing the conjoint model.

Results of the conjoint analysis and testing of Hypothesis 2 indicated that Canada was a significantly more preferred country-of-origin than China or South Korea, with the highest positive utility values. Consumers had negative utilities for products from both China and South Korea, although utilities for products from China were slightly higher.

The most preferred sweatshirt was the one made in Canada, had high quality and the lowest price($19.95). The lowest rated sweatshirt was made in South Korea and had low quality and the highest price ($29.95). When averaging the ratings of those made in the same country regardless of quality and price, Canadian-made sweatshirts had the highest mean rating, followed by China and South Korea respectively. These results confirmed the utility values measured by the conjoint analysis.

Past research has also indicated that Canadian consumers prefer domestic-made apparel (Stickl, 1980, Heslop & Wall, 1985; 1986). However, their findings were obtained by asking consumers to indicate their preferences, usually based on only

quality criteria. Results of the present study confirmed previous findings by using a more realistic method: conjoint analysis. In conjoint analysis, consumers' preferences were inferred from their utility values which were obtained from their overall evaluations of real product profiles, taking product attributes jointly into consideration.

The order of attribute importance measured by conjoint analysis in the present study indicated that quality was most important, followed by price and country-of-origin. All three attributes had significant effects on consumers' overall utilities for the garment choice, although country-of-origin did not appear to be as important as quality and price. These findings were further supported by respondents' self-reported reasons for giving the highest and the lowest ratings to certain sweatshirt profiles. Quality factors were the most frequently mentioned reason, followed by price and country-of-origin respectively. Other researchers have also found that country-of-origin was not considered as important as quality and price in consumers' purchase decisions. (Boeckman, 1986; Gipson, 1986; Bergeron & Carver, 1988). The high weight of quality may be in part due to the way that the attribute levels were chosen. Two levels of quality, high and low, were shown very obviously on the sweatshirt samples, while the price attribute had three levels, with only 10 dollar difference between the highest and lowest values. The difference in quality might be perceived greater so that

consumers reacted to it more than they reacted to price differences. In addition, since this was a simulated choice experiment, respondents might not have considered the budget very seriously. In a real purchase situation, which is more important of quality or price may depend on the range of the differences among alternatives.

Results of the conjoint analysis also showed that the effect of price on consumers' overall evaluation of garments was more obvious when the quality of garments was high than when it was low.

C. Relationships between Beliefs and Utilities

Objective 4 was to determine the relationships between consumers' beliefs about apparel made in specific countries and their utility values for sportswear items from such countries. According to the EKB model of consumer decisions, consumers develop beliefs about a brand (or country-of-origin); these beliefs then affect their purchase behaviour. In the present study, the purchase behaviour was reflected in consumers' preference ratings in the conjoint procedure. When making preference ratings, consumers' beliefs about and/or perceptions of physical attributes were integrated into overall utilities (Anderson, 1982). Pearson correlation coefficients indicated that beliefs about quality, price, style and fit of garments made in different countries were all significantly related to the utility values for sweatshirts

made in Canada, China and South Korea. The relationship between beliefs about quality and utility values was the strongest, although none of the relationships were very strong. The finding that the strengths of these relationships were not very high may be partly because one third of the respondents did not notice countries of origin of the sweatshirt sample. For those who did not notice country of origin on the sweatshirt, their beliefs about country-of-origin are unlikely to be activated when evaluating the alternatives. Stronger relationships between beliefs and utility values were found when taking into consideration only those respondents who noticed country-of-origin labels on the sweatshirt samples.

Further analysis using multiple regressions also indicated that beliefs about quality of garments made in different countries had significant effects on consumers' part-worth utilities for those countries. This implies that, even though the utilities were based on choices among sweatshirt samples which did not vary in quality among countries, beliefs about quality of products from these countries still seemed to influence that choice. This finding supports that outlined above, namely that quality is the most important attribute in evaluating the sweatshirt samples. Bergeron and Carver (1988) also found that quality was the most important reason for preferring both domestically-made and imported apparel.

D. Demographic Characteristics and Consumers' Beliefs and Utilities

The final objective was to determine differences in consumers' beliefs and utilities for respondents who differ on various demographic variables, awareness of country-of-origin and opinions about buying Canadian products to support domestic industries. Significant differences in beliefs about quality and price of garments made in certain countries were observed among consumers who differed in awareness of country-of-origin of garments. Respondents who noted the "made-in" labels on sweatshirt samples on purpose were significantly more likely to believe that quality of Canadian garments is higher, than were those who did not notice the country-of-origin labels. In other words, consumers who purposefully looked for "made-in" labels were also more positive about quality of the Canadian apparel products. Being aware of the country-of-origin of garments purchased, consumers may have accumulated more experience with products of different countries, and thus developed stronger beliefs about certain garment attributes. This is also reflected in consumers' beliefs about price of garments from China or Taiwan. People who noted the labels on purpose were significantly more likely to believe that garments from China or Taiwan were less expensive than those who did not notice the labels. Repeated observations or experiments with products

from China or Taiwan, may have given consumers the impression of inexpensiveness for clothing made in these countries. Alternatively, strong beliefs about product attributes of apparel from different countries may influence consumers to look for country-of-origin labels when making a purchase.

No significant differences in beliefs were found among respondents who differed in opinions about buying Canadian products to support domestic industries. This may due to the fact that the majority of respondents (83%) at least somewhat agreed with the statement and nobody disagreed with the statement. Boeckman (1986) in her study also found no significant differences in preference among people with different ethnocentrism.

Respondents with British and Asian ethnic backgrounds differed significantly in beliefs about quality of garments made in Hong Kong. Asian-origin people were more likely to believe the quality of garments made in Hong Kong to be higher than were those with British origins. This finding supports previous research findings that consumers tend to be more favourable towards products from countries that have similar cultural, political and belief systems to those systems in the respondent's country than products from countries perceived to have different systems (Tongberg, 1972; Wang, 1978).

The Asian-origin people were significantly more likely to believe prices of garments from South Korea to be expensive than were those with European backgrounds. This difference may

be due partly to the different references these two groups of people used. Asian-origin people are more likely to compare the price of garments from South Korea with other Asian countries, while the European-origin people may compare the price with those developed countries' price systems, such as France, West Germany, etc.

Beliefs about the quality of garments from China were significantly different among different age groups. Younger people rated the quality of garments from China higher than those who were over 35 years of age. This finding confirms the results of Bergeron and Carver' s study (1988). According to findings of other studies (Tonberg, 1972; Wang, 1978), consumers' product evaluations were related to their perceptions of the source country's culture, degree of economic development and political system. Consumers who are 35 years or over may have perceptions of China as what it was before 1978 while those who are under 35 years of age may be more likely to perceive China based on its open door policy, contacts with western world and vast economic reforms, which are becoming closer to the respondents' own country's systems.

Beliefs about fit of garments made in Canada and in Taiwan were significantly different between people with European or Canadian backgrounds and those with Asian backgrounds. Consumers who had European or Canadian origins were more likely to believe that the fit of Canadian garments was appropriate for them, while the Asian-origin consumers

were more likely to think that garments made in Taiwan fit them better. This is obviously related to the body frames of different ethnic groups. Canadian clothing may be made to fit Caucasian people while Taiwanese clothing is more likely to be made for Asian people.

Respondents who noted the country-of-origin labels on purpose were significantly more likely to have high utility values for garments made in Canada and low, negative utilities for garments made in China and South Korea than those who did not notice countries of origin. This indicates that when consumers are not aware of country-of-origin of the garment, their beliefs about products from a certain country will not be activated at the point of purchase, thus it is of little importance where the product was made. On the other hand, if consumers noted the labels carefully, their beliefs about the product country-of-origin will influence their evaluation of the product. According to information integration theory, if a consumer does not perceive a certain stimulus (e.g., country of origin), it is unlikely that he/she will integrate that information into overall utility of the product, thus not affecting the final choice.

E. Awareness of Country-of-Origin and Supporting Domestic Industries

It seems contradictory that the majority of respondents agreed or somewhat agreed with both statements that "consumers

should buy Canadian products to support domestic industries" and "consumers should spend dollars to get maximum value regardless where the product was made". This is a dilemma for consumers, who have to make trade-offs when making purchase decisions. When evaluating product alternatives, the opinion that consumers agree more strongly with will influence the final purchase decisions providing they were aware of the countries of origin of the products. Also, these are general statements; when confronted with decisions about specific products, values specific to such products become more important.

The vast majority of respondents stated that they looked for "made-in" labels of garments at least sometimes. This is consistent with Wall and Heslop's (1986) finding that 94.8% of respondents reported that they looked for Canadian products at least occasionally. The actual awareness of country-of-origin labels on the sweatshirt samples was lower (66.3%) than reported awareness, but it is still a much higher percentage than what Hester and Yuen (1986) found. In their study, only 25% of Edmonton respondents claimed to be aware of the country-of-origin when asked right after purchasing apparel items. One reason why more people noticed country-of-origin in the present study might be that the sweatshirt samples only varied on quality, price and country-of-origin, while other attributes such as style, colour, and fit were controlled. So respondents paid more attention to country-of-origin than

they usually do.

Generally, respondents were consistent in their opinions about supporting domestic industries and their awareness of country-of-origin. However, inconsistency occurred in those who said they never noticed made-in labels on garments or did not notice country-of-origin on sweatshirt samples, but claimed to agree (or somewhat agree) with the statement about supporting domestic industries. A much higher level of inconsistency was found in Hester and Yuen's study in which only a small number of consumers were both aware of the country-of-origin and cared that their purchase had been domestically produced. Consumers may think that they should buy Canadian products to support domestic industries. In practice, however, the source country of the product may not be so important in consumers' purchase decisions.

VI. Summary, Conclusions and Recommendations

A. Summary

The purpose of this study was to determine Canadian consumers' beliefs about and preferences for apparel products made in Canada, China and some other low-cost nations. The importance of country-of-origin of garments relative to other apparel attributes in consumers' purchase decisions was also examined.

The EKB model of consumer buying decisions, as revised by Engel, Blackwell and Miniard (1986) served as a broad conceptual framework for the present study. The information integration theory developed by Anderson (1981, 1982) provided the theoretical framework for the conjoint analysis section of this study.

A simulated purchase of fleece sweatshirts was designed to conduct the conjoint analysis, a method of analyzing the joint effect of two or more product attributes on consumers' overall product evaluations. Following the conjoint analysis experiment, consumers' beliefs regarding various attributes of apparel products made in Canada, China, Taiwan, Hong Kong and South Korea were measured using a 7-point scale. Also measured were consumers' awareness of countries of origin and their opinions about buying Canadian products to support domestic industries. Finally, demographic data were recorded.

A total of 106 female consumers, mainly from the city of

Edmonton, voluntarily participated in the study. The majority of subjects were obtained by intercept interviews in HUB Mall and Millwoods Recreation Center. A few university support staff were also interviewed.

Respondents had significant differences in beliefs about garments made in different countries regarding apparel attributes of quality, price, style and fit. Canadian clothing was perceived to be the highest quality, most fashionable and best fitting compared to the four low-cost countries, but it was also considered the most expensive. Beliefs about garments made in the four low-cost countries were quite similar although significant differences were found among some of these countries for each attribute. Garments made in China and Hong Kong were perceived to be of higher quality, more fashionable and better fitting, but more expensive than those made in South Korea and Taiwan.

Results of the conjoint analysis indicated that Canada was a significantly more preferred country-of-origin than China or South Korea in consumers' evaluations of sweatshirt samples. Negative utility values were found for garments made in China or South Korea, although utilities for those from China were slightly higher.

Quality, price and country-of-origin all had significant effects on subjects' overall utilities for the garment choice, with the order of attribute importance being quality first, followed by price and then country-of-origin. The effects of

quality and price on consumers' choice decisions, were significantly greater than the effect of country-of-origin.

Beliefs about quality, price, style and fit of garments made in Canada, China and South Korea were all significantly related to subjects' utilities for sweatshirts made in such countries, with low to moderate strength. The relationship between quality beliefs and utility values was the strongest.

The majority of respondents noticed the "made-in" labels on sweatshirt samples. Most seemed to agree with both statements that "consumers should buy Canadian-made products to support domestic industries" and "consumers should spend their dollars to get maximum value, regardless where a product was made".

Significant differences in beliefs were found among respondents who differed in awareness of country-of-origin, ethnic background, age and education, but not among those who held different opinions about buying Canadian products to support domestic industries. Significant differences in utilities were found among respondents who differed in awareness of country-of-origin, opinions about supporting domestic industries and age, but not ethnic background or education.

B. Conclusions

The purpose, to determine Canadian consumers' beliefs about and preferences for garments made in various countries

and the importance of country-of-origin in purchase decisions, was achieved through meeting the five objectives for the study, thus adding to our understanding of consumer behaviour regarding domestic versus imported apparel.

Canadian apparel products were significantly differentiated from those made in low-cost countries, perceived to be of superior quality, more fashionable and fitting better than those made in China, Hong Kong, Taiwan or South Korea. These beliefs were reflected in consumers' evaluations of sweatshirts in which they placed the highest utility values for "made in Canada". However, consumers also believed that Canadian apparel products are more expensive than those imported from low-cost countries. These findings supported the results of previous studies conducted in Canada (Stickl, 1980; Warl & Heslop, 1985; 1986). The conjoint analysis results also indicated that consumers' preferences for Canadian apparel were more significant when the garments were of high quality and at comparable price.

It was believed that garments made in China or Hong Kong are better in quality, style and fit than those made in South Korea or Taiwan, but are more expensive as well. Consumers had higher utility values for "made in China" than "made in South Korea". These results indicated that in consumers' perceptions, clothing made in China holds an advantageous position compared to those made in South Korea or Taiwan. In addition, younger respondents were more likely to believe the

quality of garments made in China to be high than were those who were over 35 years of age.

Although consumers differed in their beliefs about and utilities for garments of different countries of origin, the effect of country-of-origin in consumers' overall evaluations of apparel choices was much less significant than quality and price.

People who noticed country-of-origin of garments had more positive beliefs about quality of Canadian apparel products, and higher utility values for "made in Canada" than those who did not notice. Thus, increasing consumers' awareness of country-of-origin may increase the effect of country-of-origin on consumers' decisions.

Consumers with different ethnic background seemed to differ in some beliefs but not in utility values. Consumers support of domestic industries had little effect on their beliefs about or utilities for apparel products made in different countries. It seems that consumers' beliefs and opinions about country of origin were not strongly related to their final apparel choices. When other product attributes (e.g., quality, price) are the same, beliefs about products of different countries of origin may affect the final choice.

The conjoint analysis method was very efficient in analyzing relative importance of product attributes and the part-worth utilities for each level of the attribute. However, it was quite difficult to design and carry out the experiment

in a realistic setting, and would be especially so if more attributes were to be studied.

Limitations

The study was limited by the low representation of lower education levels and older age groups in the sample of woman. The sample was also limited to mostly Edmonton consumers. The small number of attributes chosen in the conjoint analysis imposed another limitation on interpretation of the results. If more attributes had been studied, the relative importance of country-of-origin in purchase decisions may have differed. The results obtained can be generalized only to choices where all attributes except quality, price and country-of-origin do not vary or very little. Likewise, the results of the conjoint analysis based on women's sweatshirt choices, can not be generalized to all apparel products. These limitations should be kept in mind when reading the following recommendations.

C. Recommendations

To Canadian Apparel Manufacturers

1. Results of this study indicated that female consumers believed that Canadian apparel products are significantly superior in quality, style and fit to those from low-cost countries. Canadian apparel manufacturers should continue to make good quality garments to reinforce consumers' beliefs.

Both manufacturers and retailers may emphasize quality, fashion and fit when promoting Canadian apparel products.

2. Although consumers preferred Canadian apparel products to those from low-cost countries, they also believed that Canadian garments were the most expensive ones. Price seems to be a weak area for Canadian clothing in the competitive market. As the results of conjoint analysis indicated that country-of-origin was not as important as quality and price, selling a quality product at reasonable price may be more important to consumers' purchase decisions than the country of origin of the products.

3. Consumers who noticed country-of-origin had significantly higher utility values for garments made in Canada than those who did not notice such labels. This implies that it is important for Canadian apparel manufacturers to increase consumers' awareness of country-of-origin, by designing effective promotion programs.

Recommendations to Apparel Manufacturers and Exporters of China

1. Canadian consumers perceived garments made in China to be close to Hong Kong products and superior to those made in Taiwan and South Korea. Manufacturers and exporters in China should provide quality products to reinforce the positive images. Special effort may be put into improving the style and fit of garments to meet Canadian consumers' needs.

2. Since consumers who were under 35 years of age were more positive about garments made in China, Chinese exporters should market their products to this segment.

3. Canadian consumers' beliefs about apparel products made in China might be influenced by their perceptions of the country. Therefore, it is important that the government of China keeps its "open door" and reform policies; develop good trade relations with other countries and reassure the stability of the country.

Recommendations for Future Research

1. This study involved only sportswear items; replications of this experimental study should be done using other product types, especially those involving higher expenditures and higher fashion products. This would allow comparisons and generalization to be made across different product types.

2. The present study used only female subjects. Since Heslop and Wall (1985) found there were differences between men and women in the formation of country-of-origin product image, future research could use subjects of both sexes to determine if differences exist in men's and women's beliefs and utilities.

3. Metric conjoint analysis proved to be a useful research tool for those investigating apparel attributes and consumer preferences. Future research may design more attributes into the analysis, so the importance of country-of-origin in

consumers' purchase decision can be compared with that of other apparel attributes such as style, fit, etc.

4. A broader sample than in this study would also be helpful in order to explore further the relationships between respondents' demographic characteristics and beliefs about or utility values for products made in different countries.

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APPENDIX A

Interview Guide

INTERVIEW GUIDE

Hello, I am a graduate student in the Department of Clothing and Textiles at the University of Alberta. We are seeking participants for a research project about how consumers evaluating apparel products when they make purchase decisions. Might you be willing to participate in my study which involves a simulated choice exercise? The process takes about twenty minutes. If you agree now to participate, you may withdraw at any time. We are seeking only Canadian residents for this study.

This consent form provides you a little more information about participation. If you can help us by participating, please read and sign the consent form, then we will begin right away. There is a free draw to win a sweatshirt. If you are interested, please leave your name and address on the consent form.

Interviewer's Guide for Part I

Thank you very much for agreeing to participate. We are very much interested in your preferences when purchasing clothing. Please pretend that you are shopping for a fleece sweatshirt for yourself today. On the table in front of you are 18 cards, each representing a garment. The card includes a photograph of the whole garment, a swatch representing the upper part of the garment, a garment label and a price tag. You have a total of 18 fleece shirts to choose from.

Now, assume that you wish to choose one of these garments for yourself. All garments are the same basic style as indicated in the photographs. You should assume that each one is available in a color which you like.. First, we would like you to look over each of the 18 garment choices. Then, we would like you to rate each alternative by assigning a number from 1 to 100. One indicates "definitely would not buy" and one hundred means "definitely would buy". In other words, the bigger the number you give, the more likely you are to buy the item. You may give any number from one to one hundred based on your real feeling about each garment .choice.

APPENDIX B

Consent Form

AGREEMENT AND CONSENT

I, _____, a resident of Canada, volunteer to participate in a study about how consumers make choices when they buy apparel items.

I consent to evaluate a series of 18 sample garments and to answer a few questions about clothing preferences. I also agree to provide some personal information such as age, education and so on. I understand that I may withdraw from the study at any time.

I am aware that data obtained will be used to study consumers' purchase decisions for apparel products and that public reports, articles and presentations might be made based on this research. I understand that my identification will be by code number only, and my personal identity will in no way be associated with the data.

_____ _____

Date Signature

* If you would be interested in receiving a summary of the final research results, please give your address here.

Address: _____

_____

_____

APPENDIX C

Conjoint Analysis Experiment

96

Code ___ ___ ___

PART I

Dear respondent,

First, we would like you to look over the 18 cards on the table which represent 18 choices of fleece sweatshirts. Next, we would like you to rate each garment choice by assigning a number between 1 and 100, with one indicating "definitely would not buy" and one hundred indicating "definitely would buy". The bigger the number you assign to a garment, the more likely you would buy it. Here is the rating scale:

Definitely wouldn't buy 1 2 3 ..... 98 99 100 Definitely would buy

For each garment, you may give any number from 1 to 100 based on your real feeling about the garment. For example, if you rate one garment "70" and another garment "30", you are indicating that you are more likely to buy the one you assigned a scale of "70".

Please record your rating for each garment on the table provided below.

GARMENT	RATINGS	GARMENT	RATINGS
E		N	
F		O	
G		P	
H		Q	
I		R	
J		S	
K		T	
L		U	
M		V	

Code ___ ___ ___

After you have finished rating all the garments, please answer the following questions:

1. Consider the garment that you have given the highest rating. What is it about this garment that makes it preferable over the others?

_____

_____

_____

2. Now consider the garment you have given the lowest rating. What is it about this garment that makes it least preferable?

_____

_____

_____

APPENDIX D

Belief Measurement

Code ___ ___ ___

PART II (To be given to participant after Part I is completed.)

The first four questions in this part make use of response scales with seven spaces; you are to place a check mark (√) in the space that best describes your beliefs about each property of garments from each country as listed below.

1. The quality of garments made in

			don't know
Canada:	High ___: ___: ___: ___: ___: ___: ___	low	___
China:	High ___: ___: ___: ___: ___: ___: ___	low	___
Taiwan:	High ___: ___: ___: ___: ___: ___: ___	low	___
Hong Kong:	High ___: ___: ___: ___: ___: ___: ___	low	___
South Korea:	High ___: ___: ___: ___: ___: ___: ___	low	___

2. The prices of garments made in

			don't know
Canada:	Expensive ___: ___: ___: ___: ___: ___: ___	Inexpensive	___
China:	Expensive ___: ___: ___: ___: ___: ___: ___	Inexpensive	___
Taiwan:	Expensive ___: ___: ___: ___: ___: ___: ___	Inexpensive	___
Hong Kong:	Expensive ___: ___: ___: ___: ___: ___: ___	Inexpensive	___
South Korea:	Expensive ___: ___: ___: ___: ___: ___: ___	Inexpensive	___

3. The styles of garments made in

			dont' know
Canada:	Fashionable ___: ___: ___: ___: ___: ___: ___	Not fashionable	___
China:	Fashionable ___: ___: ___: ___: ___: ___: ___	Not fashionable	___
Taiwan:	Fashionable ___: ___: ___: ___: ___: ___: ___	Not fashionable	___
Hong Kong:	Fashionable ___: ___: ___: ___: ___: ___: ___	Not fashionable	___
South Korea:	Fashionable ___: ___: ___: ___: ___: ___: ___	Not fashionable	___

Code ___ ___ ___

4. The fit of garments made in

				dont' know
Canada:	Appropriate for me	___: ___: ___: ___: ___: ___: ___	Inappropriate for me	___
China:	Appropriate for me	___: ___: ___: ___: ___: ___: ___	Inappropriate for me	___
Taiwan:	Appropriate for me	___: ___: ___: ___: ___: ___: ___	Inappropriate for me	___
Hong Kong:	Appropriate for me	___: ___: ___: ___: ___: ___: ___	Inappropriate for me	___
South Korea:	Appropriate for me	___: ___: ___: ___: ___: ___: ___	Inappropriate for me	___

---

* For each statement below, please place a check (√) beside the response that most closely represents your opinion.

---

5. People should buy Canadian-made products to support domestic industries.

____ Agree
____ Somewhat agree
____ Neither agree or disagree
____ Somewhat disagree
____ Disagree

6. Consumers should spend their dollars to get the maximum value, regardless where a product is made.

____ Agree
____ Somewhat agree
____ Neither agree or disagree
____ Somewhat disagree
____ Disagree

APPENDIX E

Background Questionnaire

Code ___ ___ ___

PART III (For interviewer's use)

1. When you purchase apparel items, do you notice where the garments were made?

   _____ often _____ sometimes _____ never

2. When evaluating the sweatshirt samples did you happen to notice what countries they were made in?

   _____ Did not notice
   _____ Happened to notice
   _____ Noted on purpose
   _____ Unsure

3. If "noticed" - what countries did you notice? _____
   _____
   _____

---

*Questions 4-6 will be asked when the situation is applicable.

---

4. I see you have just bought a (some) new garment(s). When you selected this(these) items, did you happen to notice where it(they) was(were) made (e.g., in Canada, or in other countries).

   _____ Did not notice
   _____ Happened to notice
   _____ Noted on purpose
   _____ Unsure

5. (If noticed) In what country do you think the item(s) was(were) made?

Items Bought	Country-of-origin
1.	
2.	
3.	

6. Would you mind if we check the label?

Items	Country-of-origin
1.	
2.	
3.	

Did not check _____

Code ___ ___ ___

PART IV

Now, we would like to know a little information about your background. Please indicate the appropriate answer.

1. Your age is:

____ under 18	____ 35-49
____ 18-24	____ 50-64
____ 25-34	____ 65 or over

2. How far did you go in school?

____ less than 7 years
____ 7-11 years
____ graduated from high school
____ some college or university
____ graduate college or university
____ graduate or professional degree

3. Your ethnic background is:

____ British	____ Canadian
____ French	____ Italian
____ Ukrainian	____ German
____ American	____ Polish
____ East Indian	____ Irish
____ Native Canadian	____ Chinese

____ Other (specify) _____

4. Where do you currently reside? _____

5. (if from Edmonton) In which part of city do you live?

_____

Thank you for your participation. We appreciate your help in this research study. Please help yourself to refreshments and have a good day!